

MSD Travel Process

A Note on Conference Travel: DOE defines a conference as "...a meeting, retreat, seminar, symposium, or event that involves attendee travel. A conference is generally organized for the purpose of facilitating a discussion or exchange of views on matters related to the mission of DOE. It also includes certain training activity that has specific objectives identified to improve knowledge, skills, or abilities of the attendees." This definition is only a starting point. Please make sure you have read both the [Deputy Secretary's December 6, 2012](#)

http://public.bnl.gov/docs/contracts/Reference/DOE_Memo_Updated_Guidance_on_Conference_Related_Activities_and_Spending.pdf

memo as well as the

[DOE General Counsel guidance on conferences.](#)

<http://energy.gov/sites/prod/files/GC%20Conference%20Guidance.pdf>

Click [here](#) to get more detailed definitions of conference and non-conference travel.

<http://www.lbl.gov/Workplace/CFO/assets/docs/conf/DOEReporting/SCEExemptionGuidance.pdf>

Domestic Travel Procedure

NOTE: All steps must be completed

For Conference Travel complete ALL steps. For Non-Conference Travel start at Step 2.

1. Enter your information on the [MSD Conference Attendance Request Smart Sheet](#)
<https://www.smartsheet.com/b/publish?EQBCT=5ac415d523634be1a81cf2f948723f53>

2. Obtain PI/Supervisor approval

Enter your information authorization via the [MSD travel authorization smart sheet](#)

<https://www.smartsheet.com/b/form?EQBCT=42d7d60ab5494bc3b0bac67275aafe82>

3. or [TREX](#) <https://trex.lbl.gov/psp/trex/?cmd=login&languageCd=ENG&> to obtain a travel authorization number. DO NOT DEPART ON TRAVEL WITHOUT A TRIP NUMBER

4. Book travel via [Cliqbook](#) / [Concur](#) <https://app2.outtask.com/default.asp?host=www.cwt.com> or through Berkeley Lab's travel agency Carlson Wagenlit, 888-243-1125

5. Take your travel

6. Using [TREX](#) <https://trex.lbl.gov/psp/trex/?cmd=login&languageCd=ENG&> enter expenses and submit for Division approval within 30 days of return from travel

[Berkeley Lab Domestic Travel Information Site](#) <http://travel.lbl.gov/domestic/index.html>

International Travel Procedure

NOTE: All steps must be completed

For Conference Travel complete ALL steps. For Non-Conference Travel start at Step 2.

1. Enter your information on the [MSD Conference Attendance Request Smart Sheet](#)
<https://www.smartsheet.com/b/publish?EQBCT=5ac415d523634be1a81cf2f948723f53>

2. Obtain PI/Supervisor approval

3. 45-60 days before travel:

Use [TREX](#) <https://trex.lbl.gov/psp/trex/?cmd=login&languageCd=ENG&> system to create and submit a Travel Authorization.

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4. Obtain Division approval then book travel via [Cliqbook / Concur](#)
<https://app2.outtask.com/default.asp?host=www.cwt.com> or through Berkeley Lab's travel agency
Carlson Wagenlit, 888-243-1125
5. Once the Division has authorized the travel, the request will be sent to DOE for approval. DOE
will notify the traveler of trip approval.
6. **It is the responsibility of the traveler to make sure DOE has approved travel. You may NOT
travel without DOE APPROVAL.**
7. Once the traveler has secured Division and DOE approval travel may occur.
8. Using [TREX](#) <https://trex.lbl.gov/psp/trex/?cmd=login&languageCd=ENG&> enter expenses and
submit for Division approval within 30 days of return from travel

[Berkeley Lab International Travel Information Site](http://travel.lbl.gov/foreign/index.html) <http://travel.lbl.gov/foreign/index.html>